

1/18

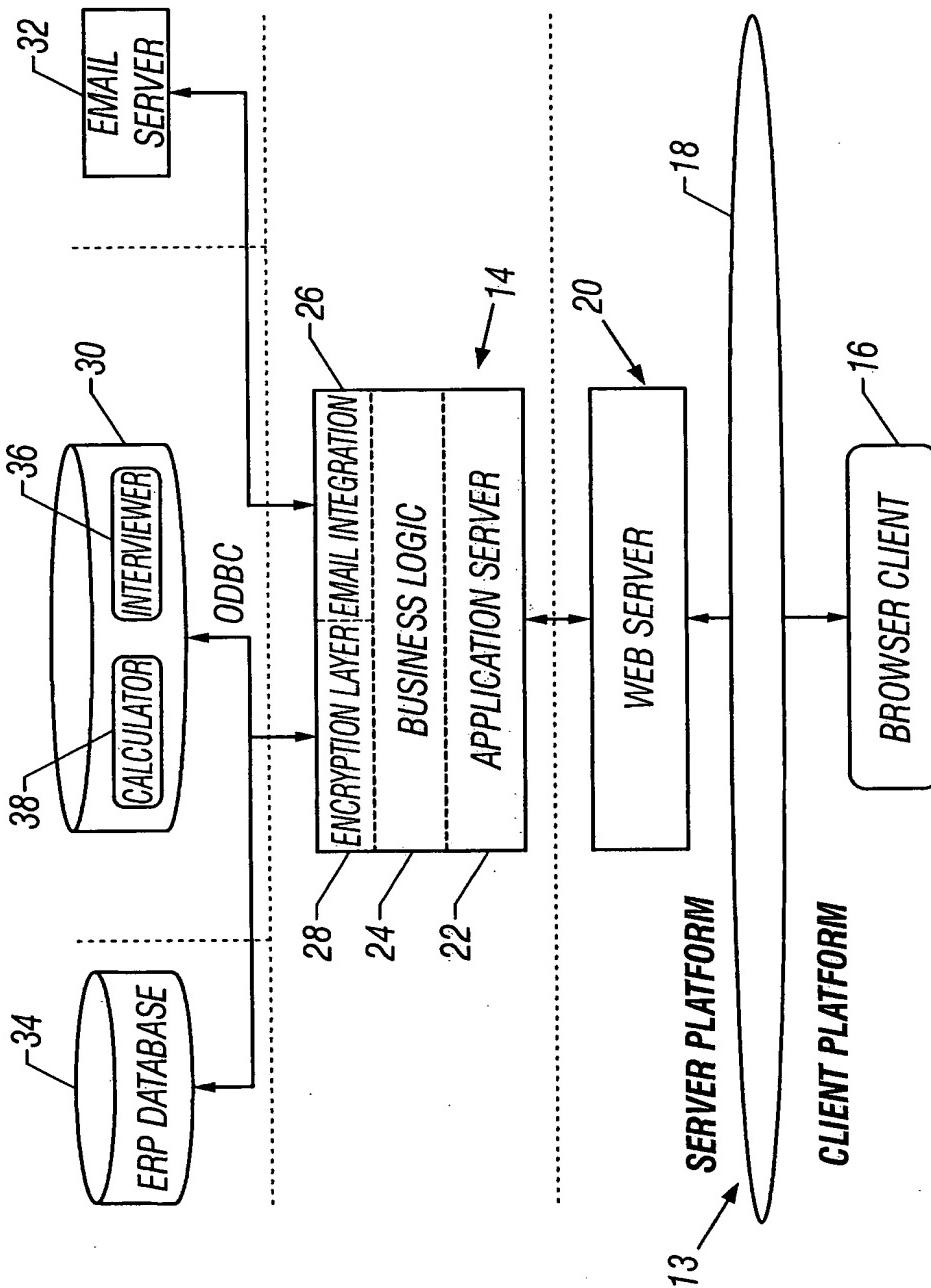
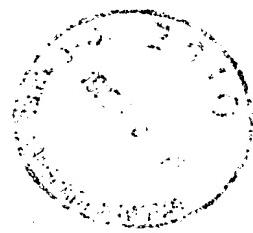


FIG. 1



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TO 200 T " 69 F 2 < 850

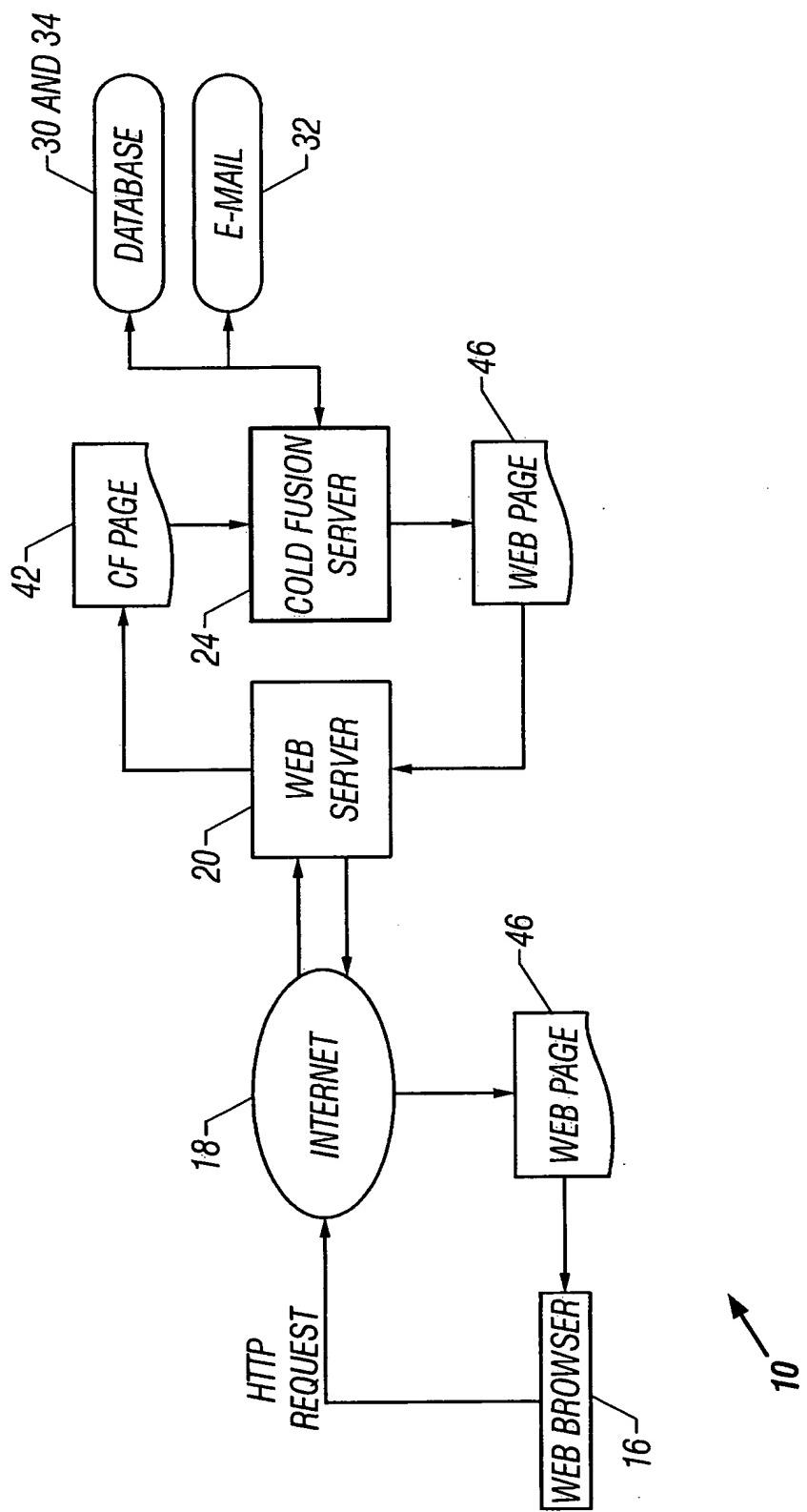


FIG. 2

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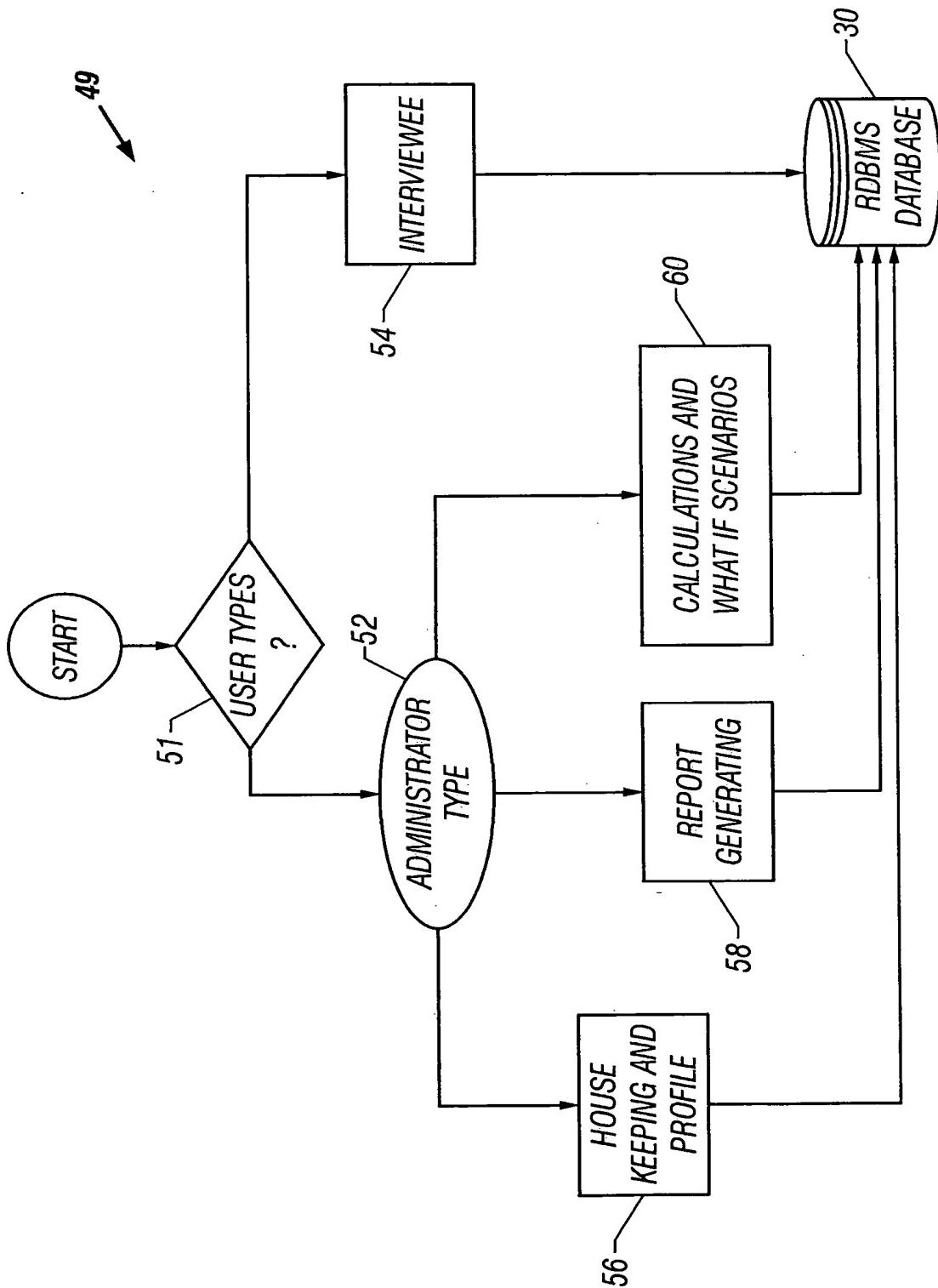
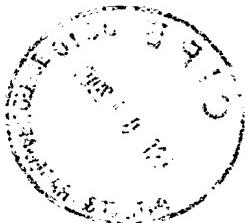


FIG. 3



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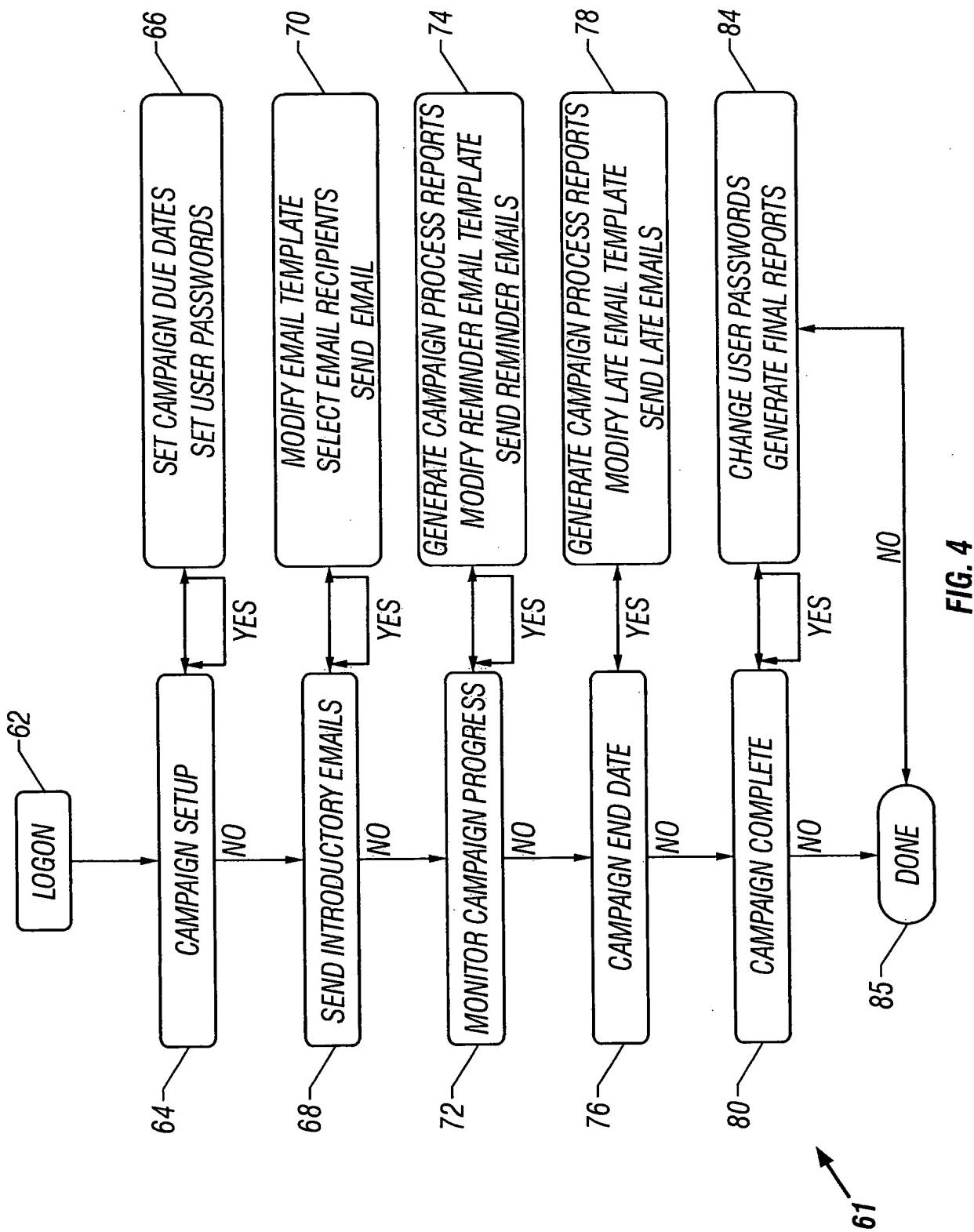
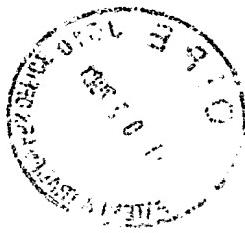


FIG. 4

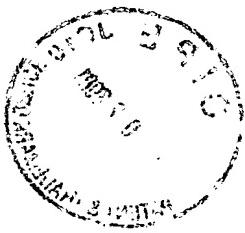
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<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	
<u>File</u>	<u>Edit</u>
<u>View</u>	<u>Favorites</u>
<u>Tools</u>	<u>Help</u>
Current Year Is 2000	
<u>Select Name</u>	<u>Planitax</u> <input checked="" type="checkbox"/>
<u>Update</u>	96
<u>Select Year</u>	<u>2000</u> <input checked="" type="checkbox"/>
<u>Add Year</u>	98
<u>Address</u>	<u>Links</u>
< >	
Current Department Is "Default Department" Number of employees in all departments is 112	
<u>Select Department</u>	<u>100-10-Default Department (3)</u> <input checked="" type="checkbox"/>
<u>ID:</u>	<input type="text"/>
<u>Name:</u>	100
<u>Add New Department</u>	104
Employees: Displaying 20 Employees Starting From 1, Number Of Employees In Department Is 3	
<u>20</u> <input checked="" type="checkbox"/>	<u>Number Of Displayed Employees</u>
<u>Search</u>	<input type="text"/> <input type="button" value="Go"/>
<input checked="" type="checkbox"/> <u>Limit Search To Selected Department Only</u> <input type="checkbox"/> <u>Search Is Performed On Sorted Column Only</u>	
<u>ID</u>	<u>F.Name</u> <u>L.Name</u> <u>Title</u>
102	(<u>Password</u>)
A-133 <input checked="" type="checkbox"/>	<u>Demo Trainee</u> - "Senior Administrator"
Done	<u>OK</u> <input type="checkbox"/> <u>Demo\68011</u> <input type="checkbox"/>
	<u>Ptx</u> / <u>Print</u> <input type="checkbox"/>
	<u>Review</u> / <u>Send</u> <u>Delete</u>

FIG. 4A

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File Edit View Favorites Tools Help ↵ 114 ⇡ ➤ Address Links ↴

(◀) (▷) (◁) (▷) [+] [50] [Add Now]

Add Virtual Employees (Planitax inc. Direct Access)

Mailing System:

Send Introduction Email For Interview Campaign To Selected Managers Only (Two Parts)
 Send Introduction Email For Interview Campaign To All Employees With Email (Two Parts) 116

Send Reminder Email #1 To Selected Managers Who Haven't Submitted The Interviewer Yet
 Send Reminder Email #1 To All Employees Who Haven't Submitted A Questionnaire Yet
 Send Reminder Email #2 To Selected Managers Who Haven't Submitted The Interviewer Yet
 Send Reminder Email #2 To All Employees Who Haven't Submitted A Questionnaire Yet

Send Late Notice Email To Selected Manager Who Haven't Submitted The Interviewer On Time
 Send Late Notice Email To All Employees Who Haven't Submitted The Interviewer On Time

Send A Hidden Copy Of Every E-mail To: _____
(Leave Blank If You Don't Want To Send Hidden Copy)

Apply Only To Selected Department
 Send Summary E-mail To From Address

Done

FIG. 4B

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File Edit View Favorites Tools Help ↵ ➤ Address Links ➤

Administrators Information

Representative (Password That Must Be Entered At The First Screen)
Password (This Field Applies To All Years)

Return Mail (From Mail Listed In All Mail Invitational Email)

118

Admin:1 (On-Line-Help)	Admin:2	Admin:3
<input type="text" value="Dante"/>	<input type="text" value="Bill"/>	<input type="text" value="Guest"/>
<input type="text" value="Orlando"/>	<input type="text" value="Rebeck"/>	<input type="text" value="User"/>
<input type="text" value="dante@planitax.com"/>	<input type="text" value="bill@planitax.com"/>	<input type="text" value="jori@planitax.com"/>
<input type="text" value="Demo1"/>	<input type="text" value="Demo1"/>	<input type="text" value="Guest"/>
<input type="button" value="Update"/>	120	
Employee Passwords:		
<input type="button" value="Edit Passwords"/> 122		
Reports:		
<input type="button" value="Run Reports"/> 124		
<input type="button" value="Done"/>		

FIG. 4C

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HTML Report - Submitted Questionnaires

File Edit View Favorites Tools Help ↲ ↳ Address Links ↴

ADMINISTRATORS ACCESS

126—

Tracking Reports Submitted By Managers

Submitted Questionnaires
 Not Submitted Questionnaires
 Submitted Questionnaires Between Dates

From: / /
To: / /

128—

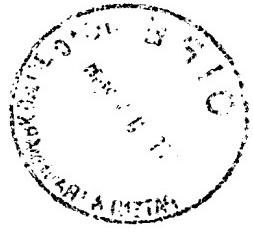
R&D Reports

Average R&D Percentages By Department
 R&D Percentages By State-Detail Report
 R&D Percentages By Department-Detail Report
 Print Each Unit On Different Page

SHOW REPORT SHOW REPORT IN A NEW WINDOW

FIG. 4D

TO DO T " GET BACK TO

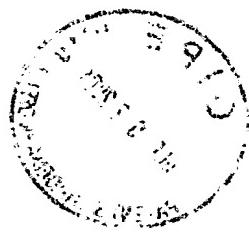


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HTML Report - Submitted Questionnaires	Address	Links		
File	Edit	Favorites	Tools	Help
 GO BACK				
<h2>R&D Tax Credit - Summary Reports</h2> <h3>Average R&D Percentages By Department</h3> <p>Calendar Year: 2000</p>				
<i>Department</i>	<i>Department Name:</i>	<i>No. Of Quest For Dept</i>	<i>Average R&D%</i>	
100-10	Default Department	1	0	
100-1001	Architecture & Validation	3	60	
100-1002	XYZ Development Team	11	59	
100-1006	PC Firmware	14	48	
100-1007	PC GM	13	77	
100-1011	R&D SW 1	21	0	
100-1014	S/W Localization	9	17	
100-1015	System Interfaces	17	0	
100-1016	Software Validation	10	49	
100-1018	PRX Hardware	8	100	
Summary: 11 Department				GO BACK

FIG. 4E

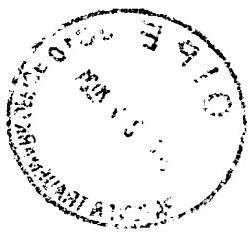
"T O D O P T " ፩ ፭ ፻ ፲ ፭ ፭ ፭



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<input type="button" value="File"/>	<input type="button" value="Edit"/>	<input type="button" value="Favorites"/>	<input type="button" value="Tools"/>	<input type="button" value="Help"/>	<input type="button" value="[-]"/>	<input type="button" value="[]"/>	<input type="button" value="X"/>
R&D Questionnaire				<input type="button" value="<"/>	<input type="button" value=">"/>	<input type="button" value="Address"/>	<input type="button" value="Links"/>
Detail Report By State							
Calendar Year: 2000							
State: CA							
Employee Name	Title	Dept.Num.	Research	Superv.	Support	R&D	Neg R&D
Melanie	2 Camberlango Tester	0	0	0	0	0	100
CA	Average	0	0	0	0.0	0.0	100.0
State: CA	Average All Department	0	0	0	0.0	0.0	100.0

FIG. 4F-1

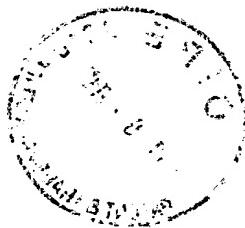


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TO DO LIST 6960

State: CA		Employee Name	Title	Dept.	Num.	Research	Superv.	Support	R&D	Neg R&D
Employee Name		Demo200	Lastname	Engineer	100-10	50	0	100	0	0
Employee Name		Paul	Jordan	Manager	100-10	0	80	0	100	0
Employee Name		CA	Average	100-10	Default Department	25	65	0	100.0	0.0
State: CA		Average All department				25	65	0	100.0	0.0
State: CA		Employee Name	Title	Dept.	Num.	Research	Superv.	Support	R&D	Neg R&D
Employee Name		Mick	Botecelli	Vocals	100-10	0	0	0	0	100
Employee Name		CA	Average	100-10	Default Department	0	0	0	0.0	100.0
Brenda Christophe	F	McKenna	Sr. Engineer	100-1001	25	5	100	100	0	0
		Rosen	Sr. Engineer	100-1001	0	4	54	58	42	47
David	F	Jow	Sr. Engineer	100-1001	4	45	4	53	47	47
		Lindley	Engineer	100-1001	4	4	45	53	47	47
Marc	F	Baily	Engineer	100-1001	0	100	4	100	0	54
		Hung	Sr. Engineer	100-1001	2	8	36	46	54	54
Done										

FIG. 4F-2



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FILE EDIT VIEW FAVORITES TOOLS HELP [-] [X]

WorldWide Financial Corp.

R&D Questionnaire Statuses Report

Submitted Questionnaires

Calendar Year: 2000

Summary: 0 Managers

② GO BACK

② GO BACK

Done

FIG. 4G



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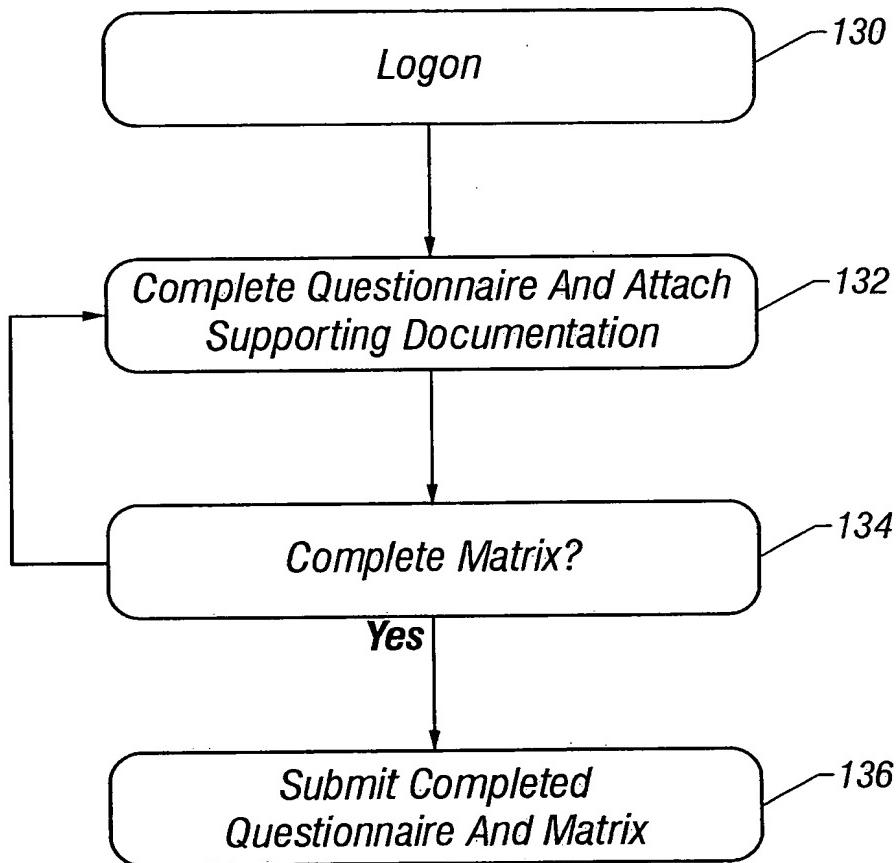
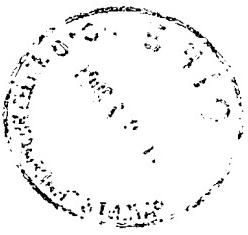


FIG. 5

0002469-100201



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File Edit View Favorites Tools Help

QUESTIONNAIRE Your Time For Submitting The Questionnaire Has Expired!

General Information

First Name: Paul

Middle Initial

Last Name: Jordan

E-mail: seda@planitax.com

Department #: 100-1006

Department Name: 100-1006-PC Firmware

Title: Manager

Part I: Research And Development Activities-In General

To Qualify All Research And Development Activities Must Be Performed In The U.S.

1. Does Your Department Perform Only Direct Research And Development Activities?

Offered By PLANITAX

144 Yes No

If Yes, Go To Part II

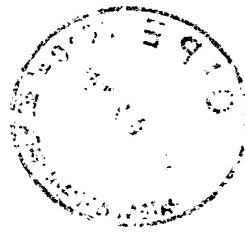
2. Does Your Department Perform A Combination Of Direct Research And Development Activities And Direct Support Activities?

FIG. 5A

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FIG. 5B



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R&D Interviewer

File Edit View Favorites Tools Help

HOME MATRIX INSTRUCTIONS QUESTIONNAIRE DEFINITIONS FAQ HISTORY PRIZES SAMPLES HELP

MATRIX For Manager Brenda MCKENNA

R&D Percentage:

Direct Research: %
Direct Supervision: %
Direct Support: %

Total R&D %: 130%
Total non R&D %: 0%

Warning!

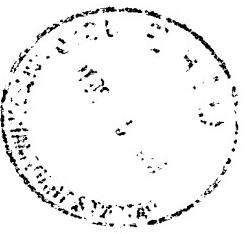
Offered By PLANITAX

171 PROCEED

○ A Red Number Signals That The Sum Of The R&D % For A Given Employee Is Greater Than 10%

FIG. 5C

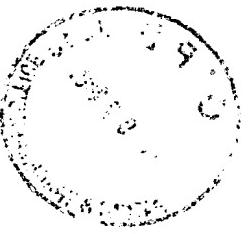
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INSTRUCTIONS		Matrix For Manager Paul Jordan		To Expedite The Completion Of This Schedule, Insert Percentages In All Fields		< ➡ ➤ Address Links ➞	
QUESTIONNAIRE							
DEFINITIONS							
FAQ							
HISTORY							
PRIZES							
SAMPLES							
HELP							
<i>Offered By</i>							
PLANITAX							
Dave Crump-100-1006	MA	<u>50</u>	<u>25</u>	<u>0</u>	<u>75</u>	<u>25</u>	
Harsh Olin-100-1006	MA	<u>100</u>	<u>0</u>	<u>70</u>	<u>110</u>	<u>0</u>	
James Allison-100-1006	MA	<u>45</u>	<u>55</u>	<u>0</u>	<u>100</u>	<u>0</u>	
Jane Sood-100-1006	MA	<u>30</u>	<u>0</u>	<u>0</u>	<u>30</u>	<u>70</u>	
Jay Conley-100-1006	MA	<u>80</u>	<u>0</u>	<u>0</u>	<u>80</u>	<u>20</u>	
Jeffrey Davis-100-1006	MA	<u>60</u>	<u>0</u>	<u>20</u>	<u>80</u>	<u>20</u>	
Jeffery Schmidt-100-1006	MA	<u>100</u>	<u>0</u>	<u>0</u>	<u>100</u>	<u>0</u>	
Laurence Raven-100-1006	CA	<u>50</u>	<u>0</u>	<u>0</u>	<u>50</u>	<u>50</u>	
Michael Wolf-100-1006	MD	<u>80</u>	<u>0</u>	<u>0</u>	<u>80</u>	<u>20</u>	
Robert Goodall-100-1006	MA	<u>100</u>	<u>0</u>	<u>0</u>	<u>100</u>	<u>0</u>	
Robert Salerno-100-1006	MA	<u>50</u>	<u>0</u>	<u>0</u>	<u>50</u>	<u>50</u>	
Ted Cammareri-100-1006	MA	<u>75</u>	<u>0</u>	<u>0</u>	<u>75</u>	<u>25</u>	
William Doane-100-1006	MA	<u>80</u>	<u>0</u>	<u>0</u>	<u>80</u>	<u>20</u>	
AVERAGE		69.2	6.2	2.3	77.7	22.3	

FIG. 5D

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R&D Interviewer - client's administrator access"		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>																															
<u>File</u>	<u>Edit</u>	<u>View</u>	<u>Favorites</u> <u>Tools</u> <u>Help</u>																														
		Main Administrator Access																															
Current Distributor Is Planitax <input checked="" type="checkbox"/> 176		New Distributor: <input type="text"/>																															
Selected Distributor: Planitax <input checked="" type="checkbox"/>		<input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; padding: 0; margin: 0;" type="button" value="Address Links"/>																															
Distributor Administrators: <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>First Name</th> <th>Last Name</th> <th>E-mail</th> <th>Username</th> <th>Password</th> </tr> </thead> <tbody> <tr> <td>Igor</td> <td>Grubar</td> <td>igorgrubar@abc.com</td> <td>James</td> <td>htmima</td> </tr> <tr> <td>Borut</td> <td>Hrzenjak</td> <td></td> <td>Hrzia</td> <td>htmpiu</td> </tr> <tr> <td>Seda</td> <td>Taysi</td> <td>sedatayisi@abc.com</td> <td>Seda</td> <td>111</td> </tr> <tr> <td>Lisa</td> <td>Yap</td> <td>lisa@abc.com</td> <td>Lisa</td> <td>Lisa123456</td> </tr> <tr> <td>Mark</td> <td>Cottam</td> <td></td> <td>Demo</td> <td>Demo</td> </tr> </tbody> </table>				First Name	Last Name	E-mail	Username	Password	Igor	Grubar	igorgrubar@abc.com	James	htmima	Borut	Hrzenjak		Hrzia	htmpiu	Seda	Taysi	sedatayisi@abc.com	Seda	111	Lisa	Yap	lisa@abc.com	Lisa	Lisa123456	Mark	Cottam		Demo	Demo
First Name	Last Name	E-mail	Username	Password																													
Igor	Grubar	igorgrubar@abc.com	James	htmima																													
Borut	Hrzenjak		Hrzia	htmpiu																													
Seda	Taysi	sedatayisi@abc.com	Seda	111																													
Lisa	Yap	lisa@abc.com	Lisa	Lisa123456																													
Mark	Cottam		Demo	Demo																													
New Administrator <input type="text"/>		<input type="text"/>																															
Current Company Is ABC" <input checked="" type="checkbox"/> 178		New Company: <input type="text"/>																															
Select Company: ABC <input checked="" type="checkbox"/> 180		<input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; padding: 0; margin: 0;" type="button" value="Company Logo"/> <input style="border: none; background-color: inherit; color: inherit; font-size: inherit; font-weight: inherit; padding: 0; margin: 0;" type="button" value="Browse"/>																															
Company Name: ABC <input type="text"/>		<input type="text"/>																															
Done																																	

FIG. 6